

Checklist for the private tax return

Good preparation and completeness of documents will make it easier for us to complete your tax return. Therefore we need the following documents from you:

- Last definitive tax assessment (calculation notice)
- Salary statement(s)
- AHV, IV, pension certificate pension fund (receipts)
- Capital and interest certificates of all bank and PC accounts in Switzerland and abroad as of 31.12.
- Tax statements from the banks of your securities accounts as of 31.12.
- Other assets as of 31.12. (horses, boats, collections, gold, etc.)
- Car as of 31.12. with brand, date of purchase, purchase price
- Assets sold or acquired (inheritances, real estate, gifts, etc.)
- Real estate: maintenance, operating and administrative costs (receipts, invoices)
- Official real estate appraisal
- Alimony, child support received or paid, or divorced spouses. (Attach agreement)
- Capital and interest certificates on mortgage debt and mortgage interest as of 31.12.
- Loans received or granted incl. interest (please attach contract)
- Other debts as of 12/31 e.g. outstanding tax bills, credit card, etc. (enclose copy)
- Certificate of paid-in contributions Säule 3a
- Certificate of purchase benefits into Säule 2
- Health insurance premiums (the health insurance company will issue a tax certificate upon request) / received health insurance premium reductions
- Sickness and accident costs (dentist, glasses, etc.), unless these are paid by the health insurance company
- Old-age and nursing home expenses (receipts, invoices)
- Third-party care costs for your children, e.g. day care center, daycare
- Donation receipts
- Tax values of life insurance policies as of 31.12.
- Professional expenses (expenses for the exercise of the profession)
- Self-paid further education and retraining costs incl. IT (purchases, technical literature, Office supplies, etc. (Enclose invoices + statements of travel and subsistence expenses).
- Have you won the lottery and/or gambling?

P R O T A X

Husband / single

Workload Full-time employed Part-time employed _____ (in %)

Work location _____

Commute with Car ___ km/day (round trip)
 Public transportation (attach receipts)
 Moped / Bike

Wife

Workload Full-time employed Part-time employed _____ (in %)

Work location _____

Commute with Car ___ km/day (round trip)
 Public transportation (attach receipts)
 Moped / Bike

Note: All income and assets in Switzerland **and abroad must be** declared.

This is how it continues: after receiving the documents, we prepare your tax return, consult with you if necessary and send you the completed tax return. All you have to do is sign and forward the documents to the tax office. As soon as you have received the final tax bill including the assessment, we ask you to send it to us as soon as possible (objection period: 30 days). Thank you very much.

If you have any questions, please do not hesitate to contact us.

Thank you and kind regards
PROTAX Steuerberatungen GmbH